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Learning Systems International
Best Practices in Budget Development FY22 ASN Tribal Grant Applicants

Thursday, March 10, 2022

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14:32:39 >> Welcome to today's webinar. On behalf of your AmeriCorps presentation team, I thank you for joining us. Before starting, let's review the event technology so you could get the most out of the session.

14:33:07 Audio for the event is broadcasting by phone and online. The event is lecture only, microphones are muted to reduce background noise. To adjust audio through computer, go to bottom left of the screen, click the small arrow next to audio settings and select a speaker, some viewers get better audio and streaming and others get better quality by phone so if you have any audio difficulties, you may want to try a different connection method.

14:33:25 There are several Zoom features we will use. At the top of the screen, click the options button and select exit full screen to display the chat panel on the right side of the slides. Use the chat panel to receive links and resource information from the panelists or respond to session activities.

14:33:38 When using the chat, select everyone from the drop-down menu so everyone could see your comments. Use the raise your hand feature if you have a technical issue and need assistance and I will contact you individually via chat to help you out.

14:33:55 Select the Q&A panel to ask questions during the event. The presenters will pause intermittently to address questions. Make sure to answer the questions only in the Q&A panel and not in the chat.

14:34:08 Select the closed captioning icon for live captioning in English. If you wish to view captioning in Spanish, select the Stream Text link posted in chat to view in your browser.

14:34:20 We are recording this event. Let's start the recording and turn it over to Colleen, policy and procedure specialist with AmeriCorps State and National.

14:34:26 >> Thank you, Jeff.

14:34:30 >> Recording in progress.

14:34:37 >> Welcome everyone to Best Practices in Budget Development FY22 ASN Tribal Grant Applicants.

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14:34:47 We are recording the webinar and we will post the session recording webinar slides in a sample budget on the competition funding page.

14:35:19 I am policy and procedure specialist at AmeriCorps State and National joined by my grant specialist, SATA, and we are excited to be here with our colleagues from office of grant administration, providing you with an overview of the opportunity. We have a detailed presentation along with links to resources we will provide in the chat.

14:35:28 We will provide opportunities for follow-up questions so if you think of a question today and if you don't have a question today but one comes up tomorrow, we are here to support you.

14:35:40 We encourage your engagement in the webinar. There are several opportunities for you to confirm your understanding of the various concepts by responding to the questions in the chat window.

14:35:56 We ask you to only use the chat for those responses and not to ask questions. We enable the Q&A feature for you to ask questions at any time. We may not respond immediately. My colleague and I will monitor the questions and we will pause intermittently to address your questions.

14:36:16 If you have any questions today that are not specific to budget development, please forward them to AmeriCorpsGrants@cns.gov or to the regional staff contact for your state or territory.

14:36:22 The regional contact list is shown here and available along with staff email contact information on the competition funding page.

14:36:29 I would like to turn the webinar over to the presenter, Lisa, Dir. of AmeriCorps of office of grant administration.

14:36:39 >> Thank you and thanks all of you for spending the next 75 minutes with us as we discuss ways to develop compliant and competitive AmeriCorps budget.

14:36:57 I'm joined by Bonnie Janicki, Senior grant management specialist and all around AmeriCorps budget group. We will keep our cameras off because slides have content and we want you to focus on that.

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14:37:07 Before we get started, I recommend you shut down any other windows you have open on computer and this will ensure you get optimal bandwidth and best audio experience and maximize your learning experience.

14:37:34 Thank you for responding to the poll questions as you waited for the session to start. It helps us focus on points relevant to you. Looks like we have quite a mix. I noticed some fixed award applicants are joining, welcome.

14:37:52 You should know majority of discussion focuses on budget submitted as part of cost reimbursement. [indiscernible] aren't subject to the same budget and cost principle requirement as cost reimbursement award recipients, this conversation will help all applicants,

14:38:08 To improve fiscal management responsibilities so even if you plan to submit fixed award application, you may find the information helpful and welcome to remain connected to the session and you are welcome to disconnect also.

14:38:30 We will pause to respond to questions today. We enable Q&A feature for your questions. Please don't enter questions into the chat. They get lost among the comments. You may ask a question by raising your hand by voice.

14:38:46 Be aware we won't address questions -- we will provide clarification to help you submit compliant budget. We will check your understanding of concepts by asking questions throughout the session.

14:39:12 Respond to the questions into the chat. Let's make sure we are clear. Q&A feature is where you ask questions. Chatbox is where you answer my questions to you. As we go through the budget narrative, examples which are from sample budget. We will post sample budget on competition funding page. Along with recording of presentation and the slides.

14:39:17 We have a great deal of content to cover so let's get started.

14:39:42 Our goal is to ensure you have skills and knowledge you need to understand functional and develop effective AmeriCorps budget and narrative. Your submission of complete budget and budget narrative will help demonstrate you have capacity to manage AmeriCorps program.

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14:40:21 During this session I will review components of budget. Includes AmeriCorps resources which are referenced as CNCS share in the applicants matching resources. At the end of webinar, should understand how to do her -- how to determine if costs are [indiscernible] -- administrative requirements cost principle and audit requirements for federal awards and this is referred to as uniform guidance.

14:40:30 Using this information and the tips and best practices, you should be prepared to submit budget.

14:40:49 Because the budget and narrative becomes part of grant recipient contract with AmeriCorps, we want and expect applicants to present strong an accurate document. Approved budget will not only serve as financial guide for grant supportive activities, but helps to ensure terms and conditions of award.

14:41:08 Helping AmeriCorps monitor grant financial compliance, could serve as a tool for AmeriCorps and award recipients to measure progress toward the match requirements and monitor budgeted expenses to actual expenses as part of the budget process.

14:41:27 I want to point out budget development is one component of effective budget management process. Let's look at the full process. As you start to work on the application, you may have asked how do I design a strong budget?

14:42:26 There's no right or wrong answer but if you said how do I design a strong budget, type "me" in the chat feature. Whether you started the process with the question, it's likely your team has determined the need to want to address with resources, set up program project goals and objectives and decided on strategy to accomplish the goals.

14:42:40 To develop the budget, applicants must translate strategy into dollars to prepare budget aligned with program goals and objectives. And then Postaward grantees will manage budgets effectively by establishing budget control process, monitoring expenses, comparing budget cost to expenses to check for over and under spending, modifying budget if necessary with approval from AmeriCorps when required.

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14:43:06 Today's conversation will focus on budget preparation process. Let's talk about approved budget. Should be realistic. Should reflect expected revenues and expenses and capacity to carry out activities. Should be consistent and aligned with program's goals and objectives, should be flexible, project financial and operating circumstances often change in the budget must adapt to the changing circumstances.

14:43:28 Focus on realistic and consistent features as they relate to budget design right now. A few minutes ago I outlined the steps your team may have taken up as part of the process. AmeriCorps encourages all applicants to approach budget design is a team activity, engaging departments based on their expertise.

14:43:53 Use the chat feature to suggest departments or individuals who could support the endeavor. Note what they bring to the process. In the chat feature.

14:44:29 CFO, managers, what else? Who else would you want involved in developing a budget for AmeriCorps grant?

14:44:51 Other thoughts that you may want to consider is human resources who have salary, [indiscernible] and criminal history cost, program officer or program colleagues the cost for training members and delivering services to the community, accounting staff have historical spending rates for costs.

14:45:12 Grant staff should be able to review for compliance and then other staff on the team that could review budget for clarity. And then we realize if you're part of a small organization, you may not have all these resources available but you shouldn't undertake budget development in a vacuum without input from others.

14:45:21 Don't be afraid to involve as many others including government leadership to provide most realistic data in the budget to make your document aligns with programmatic goals and objectives.

14:45:47 AmeriCorps recommends applicants use historical information when possible. Your accounting department should have that information. Include information as appropriate as part of budget narrative descriptions.

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14:45:58 Strong budget design provides framework for effective budget management and ensures realistic scope, appropriate detail, competitive proposal, compliance, and effective delivery.

14:46:11 That is it serves as a guide for program implementation. In order to create budget that is strong, accurate, and requires minimal clarification, we encourage you to take your time and engage others in data collection and quality review.

14:46:43 One of the objectives for this session is to provide you with tips and tools for creating competitive budget narrative. The first tip is to read and follow instructions and then notice a fun opportunity or the notice and then application instructions where you find minimal maximum cost levels and required line items both of which we will discuss later in presentation.

14:47:10 Within the application instructions, you'll find detailed budget instructions for cost reimbursement grants and B and C and if you [indiscernible] grant applicant you will find detailed instructions to support you in attachment D and E. Strongest most budget narratives are in these documents and that saves us time and effort.

14:47:15 While we are discussing application instructions, I want to point out application instructions are relevant to various grant competitions. Make sure to review the notice for details on this competition.

14:47:35 I encourage you to become familiar with uniform guidance and only include those costs that are allowable, reasonable, necessary and allocable. You could find this online with the address on the screen and then it's in the chat.

14:48:03 It is under title II, grants and agreements. After you and your team estimate financial resources you need to achieve stated program goals, you'll organize them into narratives budget categories. Following guidance in the notice and application instructions.

14:48:24 As you develop narrative, provide adequate descriptions and clear calculations. EGrants will populate budget summary and budget narrative report

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that should be able to serve as a standalone document without the need to reference application narrative for additional explanation.

14:48:25 For this reason, I recommend having somebody outside budget develop a team review the document. To check for holes and inaccuracies.

14:48:45 Uniform guidance as well as the notice of application instructions specify costs unallowable such as lobbying, entertainment, alcoholic beverages and fundraising. AmeriCorps strongly encourages applicants to review uniform guidance to avoid including unallowable costs in your proposed budget.

14:49:14 Other unallowable costs include those not necessarily to meet program objectives for example budgeting AmeriCorps symposium travel expenses for staff when only 4 are included in the budget is not allowable and could be waste, fraud or abuse.

14:49:16 And other examples budgeting \$5000 for landscaping equipment and materials for a literacy program. These are costs that would be considered unreasonable from prudent person perspective or have no logical basis for inclusion in the budget.

14:49:47 Is important to remember the cost is unallowable as part of AmeriCorps share, it's also allowable as part of the grantee share or required match. As shown on visual, grantee's share of total cost increases over time. First time successful applicants are required to match 24% for the first three year funding period.

14:49:50 Beginning in year number four, match requirement increases each year to 50% or minimum dollar for dollar match by year number 10.

14:50:20 Cash and in-kind contributions are acceptable match when they are necessary and reasonable for proper and efficient accomplishment of project or program objectives, allowable under uniform guidance, the notice and application instructions, included in the approved budget allowable under program guidance, and not paid for by the federal government under another federal award except when authorized by federal statute.

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14:50:48 Also acceptable and they are compliant with terms and conditions of award and uniform guidance. Verifiable from organizations records, the matching resources must be treated the same as AmeriCorps share inconsistent treatment includes complete and accurate documentation.

14:50:55 Frequently heard phrase in world of grants management is if it is a document, it didn't happen so please be sure to document all expenses.

14:51:00 Let me go back to the point that matching resources are allowable when not paid for by the federal government under another federal award except when authorized by federal statute.

14:51:35 Public law 93 638 allows tried to use federal funds to meet cash or in-kind requirements for grants from federal agency. Entities applying on behalf of a federally recognized tribe must obtain approval from other agency to use these funds as match and know that you must report the funds other federal funds under federal financial reports to AmeriCorps and not a closeout -- and closeout.

14:51:51 Keep in mind you may not use other AmeriCorps resources like VISTA or AmeriCorps Senior resources as match or AmeriCorps award. Because applicants must demonstrate adequate plan for non-AmeriCorps support, they are required to include the source of match in the budget narrative.

14:52:12 Entering description of the source along with the amount, cash or in-kind classification, type of match source that is state or local government, federal funds or private donations, and then confirmation of whether the sources of match are secured or proposed.

14:52:17 You don't need to secure 100% of match prior to submitting application but anticipated match must be included in the total in this section must equal amount of match shown in budget.

14:52:37 EGrants [indiscernible] budgeted match up to the nearest percentage so example, budget with 49.7% match will appear to match at 50% even though it's not dollar for dollar match.

14:52:39 I recommend you calculate percentage outside of eGrants to ensure you meet or exceed required percentage.

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14:53:03 I want to note there are no match requirements for fixed amount grants, applicants are required to enter the source of matching funds. If you are applying for any type of fixed amount award, make sure to complete this section to show how you are covering program costs beyond those provided by AmeriCorps.

14:53:14 Let's pause and see if there are questions. If you have a question related to content I just shared, enter it into the Q&A panel.

14:53:26 >> Question -- can we apply to the fixed and cost reimbursement grants?

14:53:35 >> I believe you have to submit separate applications but Bonnie, do you know the answer?

14:53:54 >> One note is if you are a brand-new applicant, you can't actually apply for a fixed cost grant. That's only for re-competes.

14:54:12 If you have two different unique proposals, you could apply for both but you can't put the same application and, in multiple different places and apply for the same funding under different streams.

14:54:17 >> Any other questions?

14:54:29 >> Question -- is it only federal funds that need permission for the match? Does state money overlap AmeriCorps grant funding?

14:55:08 >> With matching funds, you want to make sure you have permission to use the funds no matter what it is, but with federal funds, you want that explicit permission so that's why we always make sure that you have that explicit permission because a lot of times federal funds are not allowable to use as match on other agreement -- on other grants but we have that exception on our rules.

14:55:20 At any time, you want to have permission to use it but that is where you explicitly need it.

14:55:33 >> Question -- are the matching funds competitive and what are some examples of matching funds?

14:56:00 >> Matching funds are part of the funds that are not AmeriCorps funds, that support your program. What is competitive is entire program and entire

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budget. Your matching funds, funds that you raised to support what you need beyond what we give you.

14:56:13 Those would be the funds -- matching funds are additional support. Matching funds are part of program design.

14:56:43 >> Thank you for the question. Question -- we may need clarification but the question is, is there a difference with chromosomes -- [indiscernible].

14:56:49 >> I don't know the answer at all.

14:56:59 >> Jeff, can we unmute Kevin so he could explain more about what he's looking for?

14:57:03 >> Yes, should be able to unmute.

14:57:16 >> Kevin, do you want to tell us about the question with the promise zone.

14:57:28 >> We are part of the promise zone so we have a VISTA program so for us it's complex because we're not tribal program but all the dollars were released to tribal programs with VISTA programs, we collaborate with them under my office which is regional equity.

14:57:50 Regional equity as part of promise zone Obama put in place in 2010 I believe and we have four more years left on it but when it comes to things like this, grants and our VISTA program, because we were in a promise zone, there was special conditions in place for VISTA programs that were set within promise zones.

14:58:01 I guess that is where I'm at with that so I'm wondering if there are special conditions still apply when going for the grant dollars.

14:58:07 >> You are asking if you're eligible to apply because you are within a promise zone?

14:58:39 >> I guess I'm asking if there's a special conditions for these dollars. I heard you say match requirements. And then also on top of that, I note we qualify because we are working with the tribe with the resolution but that was what I was wondering if there are different -- if there are different or special conditions if

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there are any other accommodations you guys make with these grant dollars coming through for tribal VISTA programs?

14:59:08 >> This one is a state and national tribal program. We do have maximum flexibility that we give to all of our tribal programs as outlined in the application instructions, so if you have anything special you're looking at, it will be in the application instructions will look it up there.

14:59:16 >> That was a link you sent? I believe there was a link that talked about tribal applications specifically.

14:59:22 >> Yes, we have specific instructions for tribal applications.

14:59:36 >> Thank you.

14:59:57 >> We also have AmeriCorps VISTA projects which sounds like you are involved and they have different requirements so that's why reading whatever notice for that project are critical and we try to stress that with applicants because it's confusing. We know it is in there and they are different but go to this Notice of Funding Opportunity and application instructions.

15:00:23 >> I see the last question about including in matching funds so we have ability to include in-kind contributions.

15:00:40 >> Thank you. I have a couple questions. Question -- must grantees meet the exact match each year or is the match cumulative over the three year award?

15:01:09 >> The regulatory match is cumulative amount so AmeriCorps monitors match contributions to semiannual federal financial support admissions, not required to meet the contribution to close out. Grantees meet in the budget areas as long as minimum match of 24% for the first three years and increasing minimums in the year after are maintained and Bonnie do you want to add to that?

15:01:32 >> That's great, no, thank you.

15:01:33 >> There was another question?

15:01:45 >> Question -- I know AmeriCorps issued fiscal year 2021 match waiver in response to CoVid 19 challenges. If a grantee is currently operating

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with a match waiver, is it okay for them to submit fiscal year 2022 application without matching resources assuming the waiver will continue into fiscal year 2022?

15:02:12 >> It's true that AmeriCorps issued blanket match waiver for FY 2021 grants as well as for most FY 2019 and 2020 grants. In late 2021, AmeriCorps issued guidance stating economic conditions that provided blanket match waiver authority did not exist as it previously did because the current impact of the pandemic and recovery is uneven at the cross communities, it works individual consideration so we are not issuing FY 2022 blanket match waiver.

15:02:54 We hope applicants will take every possible effort to show how they support the program beyond AmeriCorps resources, there are options available for match relief. Applicants may qualify for alternative match schedule that increases match overtime to 35% rather than 50%. Applicants for which -- who wish to request the match schedule, they will submit at the time of application and then attachment G of the application instructions. Applicants may request individual match waiver following guidance

15:03:24 When requesting alternative match schedule or waiver, applicants may submit budgets with less than full required match included. Additionally, as referenced in the notice and supplemental information, applicants may request cash match replacement and if requesting this, indicate your intent to do so and clarification information of the application narrative as directed and include amount of requested cash match replacement and the source of fund section of the budget.

15:03:34 We will look an egg at an example. The cash match replacement funds will be added to the CNCS share of your budget. When added to those funds, they may not result in budget exceeding maximum cost for MSY.

15:03:41 We will share link for that as well.

15:03:57 Let's move along. As you enter data into budget narrative, it includes AmeriCorps and grantee share a project cost.

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15:04:28 Budget classifies cost into direct or indirect or admin cost categories. Direct cost includes program and member cost which budget breaks into major categories that may include line items like those on the slide.

15:04:31 These costs are allocable to the grant that is associated with grant activities. General or centralized organizational expenses spread across the entire organization or indirect or admin costs.

15:04:45 As a AmeriCorps applicant develop budget management system and the budget control process, you'll want to establish policy and procedures for tracking and documenting these expenses.

15:04:59 We will review the budget categories and the related guidance in AmeriCorps application instructions now beginning with section number one, program operating costs.

15:05:11 Category A personal expenses, you will list each staff position supported by grant and provide annual salary and level of effort as percentage of full-time equivalent devoted to this award.

15:05:25 Remember to only include position supported by application narrative and make sure not to include value of direct community service performed by volunteers unless it's for organizational function like accounting, auditing or training.

15:05:53 If you have multiple AmeriCorps grants, it's good to confirm you are not over budgeting. Including more than 100% of staff time on budget. You could do this by including statement on each line at the end of category that states percentage of time allocated to budgeted staff does not exceed 100% across all AmeriCorps grants.

15:06:12 You should confirm salary information you provide is consistent across multiple grants. It may be appropriate to budget Executive Director salary at 89,001 application and 99,000 on application you submitted six months later, you could add explanation that higher salary reflects cost-of-living and performance related salary increase for additional clarification.

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15:06:40 Category B, personal fringe benefits, you'll identify type of fringe benefit, examples, FICA, workers comp, retirement, state unemployment, health and life insurance, IRA, 401(k), and the cost for each [indiscernible]. Fringe benefits cost should align with salary lines. Category should only include staff included in personal expenses category.

15:07:15 If benefit amount is more than 30% of salary cost, list covered benefits separately and justify the cost. You may state health insurance is provided at 24%, retirement 10%, FICA at 7.65%, rather than have single line item showing fringe benefit at 41.65%.

15:07:37 Category C, travel, include purpose of cost and type of travel costs, could be air, ground, lodging, and Perdiem. Number of trips and staff or members traveling, make sure this calculation is clear and follows.

15:07:38 Note AmeriCorps sponsor technical assistance is expectation of all state commission and national direct [indiscernible] and it should be budgeted for new grantees and staff of existing grantees to attend AmeriCorps symposium preconference event.

15:07:49 Take care to separate staff and member travel costs and ensure training costs are not included in these categories and travel costs are including in training lines.

15:08:20 You may budget mileage at a higher rate than federal reimbursement rate which is 58.5 cents per mile as of January 1, 2022. As long as it follows your organization's policy. If so, make a note it does in the budget narrative.

15:08:21 Member travel may include expenses for members to travel outside service location or between sites. Costs associated with local travel like bus passes, mileage reimbursement or use of a car should not be included.

15:08:45 Category D is equipment, equipment defined as tangible, nonexpendable personal property having useful life of more than one year and [indiscernible] cost of \$5000 or more per unit.

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15:08:58 If less, expense goes into supplies category. Equipment is limited to 10% of total AmeriCorps funds requested. You must show unit cost the number of units with purpose of equipment in budget.

15:09:13 Next is category E and that supplies. These are consumable supplies and materials including member service gear. AmeriCorps identity items like clothing with logo is required budget expense and may be charged to AmeriCorps share only if it includes AmeriCorps logo.

15:09:15 Applicants should make a note in budget narratives when items include the logo

15:09:34 . You may charge a safety gear to AmeriCorps share regardless of whether it has logo or not. Organizations must -- must purchase all member service gear with non-AmeriCorps funds. Supplies, make sure to list any single items costing \$1000 or more.

15:09:54 Category F, contractual consultant category, include all services except training and evaluation consultants while AmeriCorps does not impose a maximum daily rate, we ask include basis of which you determine expense which may be daily rate.

15:10:07 Do not include value of direct community service performed by volunteers, here or in personal expenses category unless it's for organizational functions like accounting, auditing or equipment maintenance.

15:10:26 Category G is training. This includes expenses related to staff and member training. Staff training enhance staff skills for budget -- for budget implementation. Member training may include life after AmeriCorps training.

15:10:35 Be sure to include daily rate for consultants if used and if not use some type of detail to justify cost.

15:10:58 Category H is evaluation includes project evaluation cost, additional staff, consultants, evaluation instruments. This is not for assessing progress to performance measures but evaluation of community impact and assessment of program design or systems.

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15:11:05 Include daily rate for consultants if used in this category.

15:11:32 Category I is other program costs, a bit of a catch all for those projected expenses that don't fit into other categories. In this category, include National Service criminal history check cost for members and employees who receive salary, education award, living allowance or stipend. If not included, explain how the costs are covered and confirm how the checks are completed.

15:11:43 You may include office space, utilities, phone and Internet and similar expenses provided that the expenses are not included as part of organizations improved indirect cost rate. And that they are prorated and appropriately allocated to the project.

15:11:55 You may include member recognition costs which are allowable if appropriately justified and they exclude gifts and food provided in entertainment setting.

15:12:07 Multistate applicants may include sub- grants indicating approximate number average amount of [indiscernible] awards. Show required subgrantee match in the grantee share column.

15:12:19 Let's pause to check for questions and if you have a question about section number one, enter it into the Q&A panel now.

15:12:44 >> Question -- are the matching funds competitive and what are examples of matching funds? That was left over from earlier slides.

15:13:17 >> We look at entire application for competitive grant process includes what people propose to do using our funds as well as their own matching funds. Examples could include private foundation may be individual donor and also could include in-kind's space where members may be serving so could run the gamut and make sure it's noted in the source of funds section. Bonnie, any other examples that may be helpful?

15:13:44 >> Absolutely. There was the question about in-kind and the labor so there is the donation of time from your accounting services if they want to donate time for that and they provide services to you.

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15:13:57 Or staff time if the organization is covering the staff time, that could be considered in-kind donation as well.

15:14:03 >> Any other questions?

15:14:13 >> Question -- can you review what are acceptable travel expenses?

15:14:50 >> We have seen audit findings around travel expenses so what you want to make sure you are doing when you charge your travel expenses is that they are direct expenses and for the purpose of the grant and necessary and reasonable for the grant. Normally it would be travel, local travel or travel to come to Washington DC to be a part of symposium or something.

15:15:09 We would expect you to bring one person or two people whatever we outline would be the reasonable cost, necessary cost and then the travel to program sites and those things would be reasonable and necessary if you could charge it directly.

15:15:23 >> I do not see any other questions in the Q&A at this time.

15:16:10 >> Ones that I want to mention around food that could be allowable and that's if it's justified. Justification for food is when is provided by disseminating information such as training event, breaking and having participants go off-site for food, food could be allowable cost. That would be important to note situations like this as justification in budget narrative so it doesn't look like you're buying meals for people.

15:16:43 Another thing we see is if there's 20 line items in personal expense category, do they need 20 separate fringe benefit lines if they calculate all staff fringe benefit the same so we have seen this before as well. Most applicants enter each listed in category 1 A with perspective fringe benefit. If it's consistent for all staff, applicants enter costs as staff salaries such as fringe calculated 31% of all personal expenses.

15:17:04 They could enter the type of fringe benefits such as health insurance or retirement on each line as percentage of all personal expenses like health insurance 20% of each salary, retirement 14% and so on so a couple other things we wanted to highlight as we move out of section number one.

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15:17:19 Let's review budget narrative sample entries and talk through common clarification issues that applicants can avoid.

15:17:43 This staff travel category includes number of errors. Use the chat feature to note the ones that you see.

15:18:27 Here's a few to call out. Applicant included AmeriCorps sponsor grantee training but did not include cost calculation to explain how they determined the charge. This may not meet the standard but what if the training was in Washington DC and the travelers were located in Northern Virginia, with the cost to be reasonable

15:18:53 ? Second line item, applicant proposed mileage rate higher than the federal rate and this is allowable providing it aligns with organizations policy. This applicant could avoid having to clarify the rate by making budget narrative notation that this follows the travel policy of the organization.

15:19:18 They could avoid to clarify the rate by making budget narrative notation that follows it and included in last line of category. Third line item shows applicant didn't double check calculations for accuracy. Details in the description total \$2050 rather than budgeted 1954. This often results when applicants revised budget category which is why you cannot double check enough.

15:19:42 Last line in category includes costs for member travel. Member travel is allowable and this is appropriate detailed entry, there are -- there is category. Please check to make sure you enter the line items in appropriate category.

15:19:48 Example at bottom shows correct entry. Adequate detail included for each line item including number of individuals traveling, number of travel days or miles traveled and mileage rate all calculations total budgeted amounts and no erroneous costs included in the category.

15:19:54 The second version is ready for submission to AmeriCorps.

15:20:26 Here's a sample from supplies category of budget narrative. Take a moment to consider which if any of costs shown here may require clarification after AmeriCorps reviews the line items and post your findings in the chat feature.

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15:21:04 A few to call out on the first line, applicant provided average monthly cost of office supplies but calculation is incorrect. Appears to be based on 10 months of cost. Computers line item budgeted 2200 and includes no detail. How many computers are they proposing to buy? Is this line just for computers or other items? Without this detail we can't determine if cost is reasonable and necessary.

15:21:06 Application instructions state applicants must list all single supply items with a cost of more than \$1000 per unit.

15:21:37 Member supplies category includes cost per member and number of members which is great but when you calculate this, it totals a bit higher than what is budgeted. Total is \$7030. Because AmeriCorps budget reviews includes assessment of calculation accuracy, I recommend adding the term like average or approximate in this description like included in the office supply line to provide flexibility.

15:21:55 Any required budget items missing from this category? What about AmeriCorps member service gear?

15:22:16 The second version includes member gear with appropriate detail. Additional revisions include corrected office supplies calculation, details about the computers and the term average in the member supply line. This is much better and more compliant budget narrative category.

15:22:29 Any questions related to section 1 of the budget before we discuss section 2?

15:23:04 >> Question -- are there any restrictions on type of equipment? I would be happy to take that question. When you think about equipment that you will be using on the grant, you want to make sure it's reasonable and necessary. These grants are not about capacity building. They are about providing service so if you need equipment to provide service, if you could make the case for reasonable and necessary, you could put it in.

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15:23:24 There's a 10% cap on dollars we give for equipment. In terms of equipment you could use, it needs to be reasonable necessary for this program objective.

15:23:34 >> Question -- shouldn't there be description of member supplies?

15:23:41 >> That's the sample you just gave, Lisa, do you want to handle that?

15:23:58 >> It would be good to know what it is and it does give average per member and number of members so you could back into the calculation but the more details under purpose section, the better because it makes it easier for review.

15:24:17 You want budget narrative to standalone you want application narrative to standalone so whatever the member supplies are, are they reasonable and necessary to accomplish objectives of the project. Bonnie, what do you think?

15:24:30 >> I like that we always say the more the better so I like more of a days -- I like more of a description so I agree with you, Lisa.

15:25:15 >> You want your budget narrative to tell the story of what you're trying to accomplish and that's why the match is important. It's a requirement and it represents expenses that you need to accomplish no one could do everything they need to do on our grants justifying what they get from us so tell us the story through budget narrative what you're trying to do and how you expend the money like the travel example, the devil is in the details how far are you going, what type of travel, we want to

15:25:21 Bonnie, do you want to add anything?

15:25:29 >> You hit it right on the head, Lisa, so thank you.

15:25:34 >> Any other questions?

15:25:36 >> There are no others right now.

15:25:45 >> I will turn it over to Bonnie to walk us through section 2 and section 3.

15:26:05 >> Let's move on to section 2 focusing on member cost, member living allowances and support costs, be aware if you are applying for a planning grant, your budget will not include any member cost.

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15:26:27 The Notice stipulates minimum and maximum living allowances and shows full-time living allowance ranges between 16 502 and 33.4 per member. Only required to provide living allowances for full-time members and if a program chooses to provide living allowance to less than full-time members, it must comply with maximum limits in the Notice.

15:26:47 There is no minimum living allowance amount for member types other than the full-time. Budget narrative will identify number of members in each category and living allowance amount they will receive.

15:27:12 Member support costs must follow the laws of the states where members serve. FICA unless exempted by IRS is 7.65% of the total living allowance. You must offer healthcare to all full-time members. Programs may not pay healthcare benefits to less than full-time members with grant funds unless those less than full-time members are serving in a full-time capacity for sustained period of time such as in a full-time summer program.

15:27:32 In that case you should know in the budget narrative. Please include number of members receiving the benefit and a per person cost in the cost calculation. If you calculate cost based on percentage of members that historically has accepted or you anticipate will accept the benefit, make sure you note in the justification.

15:27:55 Tribal applicants may use Indian health service coverage is to provide healthcare to full-time or less than full-time members serving in a full-time capacity. When doing so, know that these costs may not be included as part of your match. Instead, you may use Indian health services coverage to provide healthcare to full-time members.

15:28:13 You should in your budget narrative state that you are providing the benefit through IHS and enter zero as the cost. You may include Worker's Compensation cost if the state where members are serving requires it.

15:28:31 It's not required if it's not required programs must obtain occupational accidental death and dismemberment coverage for members and be aware that it's the applicant's responsibility to check with the Department of Labor to

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determine if you're required to pay Worker's Compensation and if so at what level.

15:28:46 Unemployment insurance and other member costs must be included calculation details. You may not charge the cost of unemployment insurance taxes through the grant unless it's mandated by state law.

15:29:08 Let's consider sample member support costs section. Use the chat feature to identify errors in these member support line items. Do you see any errors?

15:29:14 I will talk through it. As you are putting into the chat.

15:29:33 The applicant included required FICA for members but calculated it on incorrect basis. They have it at 5%. According to application instructions, applicants must calculate FICA at 7.65% of total living allowance.

15:29:51 Healthcare line item, applicant is proposing to cover member healthcare cost what benefits from IHS. That is allowable and you may recall I said you cannot include those costs as part of your match.

15:30:27 The way that this applicant did that instead should be added to show applicant is providing required healthcare coverage but at it in as zero line -- as zero dollars line item. Any required line items missing Kiko workers comp? Applications -- instructions state it's a required line item and if state requires working -- if the state requires workers comp and if the state does not, one of these two costs must be in this budget.

15:30:48 Second example includes correct FICA calculation additionally healthcare line item was corrected to exclude actual cost of the coverage. Noting it's provided off budget in this example includes line item for required member Worker's Compensation cost. Second example is much more compliant and competitive.

15:30:58 Any other questions related to section 2?

15:31:03 >> I don't see any questions.

15:31:07 >> We will keep moving

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15:31:27 . This is my favorite Subject, admin and indirect costs are general centralized cost support the budget. They don't include specific project costs.

They may be included in organizations indirect cost rate agreement if one exists.

15:31:38 If you choose to include indirect costs in your budget, there are three methods of calculating indirect costs in section 3 of the budget regardless of the method, AmeriCorps share is limited to 5% of total AmeriCorps award funds expended.

15:32:14 Using the Corporation fixed percentage method, referenced as the 510% fixed admit -- administrative costs, grantees could cause admin costs without federally improved -- approved cost rate without documentation to support allocations using this method applicants could allocate 5% of the AmeriCorps share to AmeriCorps share administrative cost and 10% to all direct costs for the total of both AmeriCorps and grantee share.

15:32:50 Applicants should follow guidance of application instructed to calculate the maximum allowable and if allocating less than maximum allowed, note the percentage claimed in the budget narrative. If applicants have federally approved indirect rate, they must use this method and approved agreement constitutes documentation of admin costs. AmeriCorps share is limited to 5% of AmeriCorps funds.

15:33:06 Be sure to specify the cost type whether it's provisional, predetermined, fixed or final and supply the rate and based on which it is calculated, salaries, modified, total direct costs and so on and follow the guidance in the instruction to calculate maximum amount allowed.

15:33:18 If allocating less than maximum note the percentage. Applicants must enter details of approved negotiated indirect cost rate agreement in eGrants using guidance in the application instructions.

15:33:39 The third calculation method is available to organizations who do not have federally negotiated indirect cost rate and who have received less than 35 million in direct federal funding. It's the de minimis rate of 10% of modified total

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direct cost.

15:33:59 If using this rate, applicants treated the same as federally approved indirect cost rates. It's important to note if this option is selected, organization must use consistently across all organizations federal awards. Like a federally approved indirect cost rate if you use this rate, enter the details under federally approved indirect cost rate heading in eGrants.

15:34:11 Guidance for calculating administrative costs using each method is in the application instructions. Please pay close attention to calculate and guidance to avoid having to correct calculations during the clarification process.

15:34:44 Now it's time to review indirect cost line items. This example shows calculating using Corporation fixed, [indiscernible] and that's the first one I talked about as demonstrated applicant is electing to claim full 5% of AmeriCorps share and less than the full 10% of grantee share and this is allowable and when done applicants state the rate

15:35:16 That they are claiming and the cost calculation as it's shown in the example. Second example shows applicant with federally approved indirect cost rate as requested in application instructions, they provided cost basis on which it's calculated, approved rate and the rate claimed. A detailed cost calculation and in this example, rate is based on total salaries and fringe benefits.

15:35:47 We didn't review calculation -- category a budget narrative, look at the sample budget that accompanies this training, you'll see those two budget categories total \$93,327. Applicant multiplied that by approved rate of 40.5% to get the maximum allowable indirect costs of \$45,264.

15:35:57 In this example, applicant chooses to claim 45% for the budget for a total of \$41,997. As with first example, applicant is claiming full 5% of AmeriCorps share using calculation provided in the application instructions.

15:36:27 If you have a negotiated indirect cost rate, or you are using 10% de minimis rate, enter details of the rate in eGrants using guidance in the

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application instructions and make sure you calculate the cost using details of the rate.

15:36:31 I want to note if you apply for federally negotiated indirect cost rate and it hasn't yet been approved, you should use the Corporation fixed percentage to budget any indirect costs knowing you could revise the budget when negotiated rate is approved.

15:37:04 If you have approved rate that expired or will soon expire, you should note the new approval is pending and provide expended approval date and the budget narrative and if rate is not approved by the time of award, AmeriCorps may request to revise a budget using the fixed percentage rate and in rare circumstances, AmeriCorps may approve award with special condition and amend the budget upon approval of a new rate.

15:37:07 Let's take another pause to see if there's any questions related to indirect costs.

15:37:19 >> Question -- how does applicant get federally approved rate?

15:37:41 >> Federally approved indirect cost rate comes through your cognizant agency, whoever gives you the most federal dollars and you work with them directly to secure the rate.

15:37:54 >> Question -- are administrative costs calculated for each year or is that the total cost over the life of the grant?

15:38:13 >> When you apply each year you would do a 5% each year at time of application and then at the end of the day, at the end of the final grant, we look at it to make sure you have gotten the 5% at the end of the day.

15:38:17 Could you say more Lisa?

15:38:33 >> I would say because we award when your grants, they may have three year overall period but we award in increments of one year and we look for budget to reflect that year.

15:38:35 >> Thank you, Lisa.

15:38:43 >> Question -- what documentation must be supplied when using each of the indirect cost rates?

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15:39:26 >> When you are entering if you have a federally approved indirect cost rate, the application instructions guide you on how to enter your data related to the indirect cost rate and tells you exactly what you need to put into eGrants and that's the same with deminimis. Application instructions tell you what to put in for that. At the end of the day what you must have for documentation is if you have federally approved indirect cost rate, you need documentation for that. We won't ask to see it un

15:39:38 For the fixed 510 or deminimis, you will apply without needing documentation.

15:40:08 Let's move on. Let's talk about source of funds. The last section of the budget narrative is the source of funds section. In it you won't list budget categories or line items like we talked about, instead, you enter the source of the resources covering specific line items.

15:40:46 Under the budget section, 3 tab, you find a source like shown here. Once you click the link, new screen opens for you to enter the source and be sure to note the source of the match and whether resources are secured or proposed, amount of the match, classification of if it's cash or in-kind resources and the type of source, private, state, local or federal government in the appropriate field.

15:41:14 I want to caution you to update the section as well as indirect cost section after making any budget revisions so they reflect all the changes. Total in this section must equal total amount of the budgeted match exactly so we see a lot of applications that come in and at the end of the day they made adjustments in the budget they forget to adjust indirect cost section and the source of fund section so make sure that you come back and double check that before you submit.

15:41:45 When complete source of fund section might include content similar to this example. Note this example only includes source and match and not specific category or line items covered by the resources and provides required details

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noting that the resources are secured or proposed, in-kind or cash donation and provided by private or government entity.

15:42:03 As you review the sample, you'll see AmeriCorps match replacement you'll see AmeriCorps match replacement that I mentioned. When you request cash match record -- replacement you enter amount of request as source of matching funds.

15:42:40 Remember when AmeriCorps issues a grant award, with cash match replacement, total of match replacement funds are added to AmeriCorps share of the funds and together the award amount may not exceed the maximum cost per MSY. Example from presentation and the sample budget narrative, total AmeriCorps share of the award is 6000 -- \$667,470 and if we add this to the 126 520 requested cash match to amount, total funds awarded is \$793,990.

15:43:17 When we divide that by the amount of 38 MSYs, actual cost per MSY is \$20,894 which is below this year's maximum of 21,600. When completing this section, take care as you use drop-down menus. It's easy to change selected classification of source incorrectly and train this information may result in additional clarification.

15:43:27 As long as we discuss matching resources, I want to remind you if a cost is unallowable as part of AmeriCorps share, it's also unallowable as part of the grantee share. If you aren't sure if the cost is allowable, uniform guidance is the best place to find the answer.

15:43:49 Sample budget narrative from which I pulled examples in this presentation will be posted to the funding page. Feel free to use this as a resource when developing your own budget narrative. Let's take another pause to see if those questions related to source of funds section of the budget.

15:44:09 >> I don't see any questions. Let's pause for a moment

15:44:40 >> I want to stress the benefits of involving your team and someone outside of the team. In the budget development and review process. Strongly recommend using the tips on this visual and in budget checklist found in

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attachment on application instructions to make certain you submit accurate budget narrative that meets AmeriCorps requirements.

15:45:01 Highlights budget checklist include confirmation that it meets AmeriCorps cost guidance. Is the full-time living allowance within maximum and minimum levels between 16,502 and 33,000, 42?

15:45:39 EGrants will calculate this for you and you could get a head start on determining cost per MSY by dividing total of AmeriCorps funds requested by total number of MSYs requested. If application is for \$100,000 in AmeriCorps funds and 10 MSYs, cost per MSY is \$10,000. The cost per MSY did not include childcare or the cost of single -- or the cost of the education award.

15:45:43 Does the budget meet or exceed the required match and is the source of matching funds section detailed and aligned with amount of budgeted match?

15:46:24 You may also want to check the budget includes all required costs such as member gear, National Service criminal history check, member FICA and full-time member healthcare. Along with those costs that AmeriCorps encourages, applicants include AmeriCorps technical assisting events, new staff attendance at AmeriCorps symposium and preconference events. If you don't budget those costs, include explanation for how the cost will be covered in your budget.

15:46:40 As much as possible due to eGrants character limits, budget narrative should provide details including purpose and accurate calculations in whole dollars and exclude unallowable costs. Use zero dollars line items to enter additional information. Please check all calculations before you submit.

15:46:56 You should ensure that you align your budget narrative to the program goals and application narrative including miscellaneous, contingency or other undefined budget amounts may adversely impact your application stats.

15:47:29 Before submitting application, make sure your organization has active registration with System for Award Management. All applicants must register with this SAM, at the address in the chat and maintain active membership until process is complete. If applicant is awarded a grant, it must maintain active registration throughout the life of award.

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15:47:49 If you are applying to SAM for the first time, apply early because it may take a while to activate your registration. We recommend you apply for or renew your registration at least three weeks prior to the application deadline to allow time to resolve any issues that may arise.

15:48:13 Applicants must use their registered legal name and address on all applications at AmeriCorps. SAM is a free service. Never pay for a registration. If you are new or re-competing applicant, make sure you submit your operational and financial management survey as instructed in the notice.

15:48:34 Submit your mistress -- recent audit to the clearinghouse and form 992 GuideStar and remember to enter your [indiscernible] negotiated cost in details if you have one in eGrants. Details for all these actions are on the funding page of AmeriCorps.gov.

15:48:54 AmeriCorps is aware on occasion applicants experience challenges with the eGrant system. EGrants automatically performs limited compliance check validating the budget and may result in warning or error message.

15:49:02 Some of these matches prevent you from submitting your application so you should be aware of the differences and related actions will stop for instance when you receive a warning, submit your application but the application or budget may not be compliant with the guidelines.

15:49:37 An error message will not allow you to proceed until you correct the error. You must resolve all errors before submitting application. If you experience a challenge, contact AmeriCorps hotline. The number is 800-942-2677 and a link to help request form is at the bottom of most eGrant pages. It's wise to forward a copy of the service ticket to AmeriCorpsGrants@cns.gov.

15:49:41 We have documentation of the problem.

15:50:09 I want to draw your attention back to these bullets I shared earlier. I encourage you to keep a checklist as you develop your budget and consult it as a budget development guide and quality assurance checklist. Many budgets require extensive revisions and part because applicants don't follow the points

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outlined. You'll save yourself a great deal of follow-up by checking proposed budget against this checklist before submitting to AmeriCorps.

15:50:20 Let's pause for any final questions. Please enter them into the Q&A panel.

15:50:37 >> Question -- to the living allowances include the wages?

15:50:50 >> What you are allowed to provide is living allowance to your members so it's not considered a wage but it's a living allowance. Lisa, anything else to say on that one?

15:50:59 >> [Audio is choppy]

15:51:03 Members are not employees.

15:51:21 >> Yes, they are not employees. We don't want any supplementation or anything so there would not be wages because they aren't employees. They would just receive living allowance.

15:51:35 >> There are no other questions.

15:52:04 >> Before we end the webinar, I want to alert you to several additional technical assistance opportunities. If you have additional questions about the budget -related details and the NOFO, application instructions or this webinar, I want to invite you to join us for budget development office hour on March 24 from 230 to 3:30 PM, Eastern time.

15:52:27 Registration link is on the competition. The funding page. And this slide. You can resubmit your budget of all my questions so that we can prepare to respond to them. Remember to use the same email address or email regional contact for your state or territory with non-budget related questions.

15:52:51 >> Can I add something? If you have not read the NOFO and application instructions, please review those in advance because you will ask better questions and understand what other people are asking so we can't plug enough to review this prior to the session if you haven't already.

15:52:58 >> Yes, absolutely. That's the best way to get the most out of the presentation.

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15:53:21 Let's talk about the upcoming webinars. I will remind you that our staff have a few more webinars over the coming weeks, registration is required for each of the sessions and links and details about each webinar are available on the funding page.

15:53:30 If you're unable to join the live webinars, like this webinar, we post the session recordings to the funding page about 10 business days after event.

15:54:01 We have reached the end of our time together and I appreciate you responding to the final poll. Let us know how helpful the session was for you and if there aren't any other questions, I thank you for your time and your interest in AmeriCorps and wish you all the best in the competition. This will conclude our webinar for today. You can disconnect now.

15:54:05 [End of session]T

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